E-Grants
Management System
MONTANA Office of Public Instruction

MTW
Solutions

E-Grants

Page Lock Control LEA
User Guide

Version 1.0

April 2007

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Revision History

Version	Status	Date	By	Summary of Changes
1.0	Completed	4/11/2007	dt	Customized document for OPI LEA E-Grants users

Copyright Statement

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Guide for Use of GMS Page Lock Control

Overview

E-Grants Page Lock Control functionality and Web pages are used to manage the locking and unlocking of individual E-Grants Web data pages within the E-Grants online applications. The functionality works as follows:
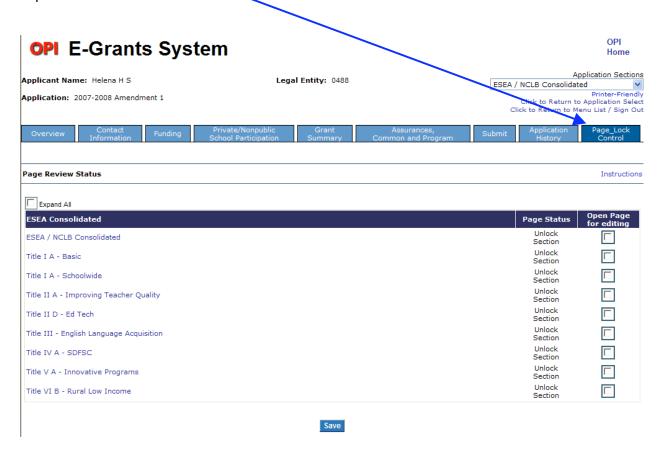
- OPI users in the appropriate user groups (e.g. Grant Reviewers) are able to 'lock' E-Grants application data pages during the application review process. Application Section level control has been developed that provides the ability to lock all pages in a given Application Section for ease of use. OPI staff can also 'unlock' E-Grants application data pages that had been previously locked. This ability is available following LEA submission of the completed application to OPI Grant Review (GR) staff for agency (OPI) review.

    - It is important to note that all OPI grant reviewers will use the Page_Lock Control pages as part of application review process. Depending on the sequence with which reviews are completed (at the various workflow Stops) and the timing of when an OPI GR completes their review of a particular district application, the Page Review Status page may have already been initiated and selections made on this page.

- LEA/applicant users in appropriate user groups are also able to 'unlock' some E-Grants data pages. This capability is available to the LEA staff while the application is in LEA control – for example, when the application has been returned by OPI to the LEA for needed changes. The LEA users have the ability to 'unlock' pages that have been LOCKED by OPI however; they cannot 'unlock' pages that are marked "FINAL".

- E-Grants System controls: The system will automatically LOCK all pages and will mark appropriate Web data pages as FINAL (e.g. Assurances pages are FINAL and cannot be unlocked once submitted to OPI) or during the Amendment Creation process. This will force the applicant to 'unlock' pages they intend to modify on the amendment. The system cannot lock all pages on Submit because this functionality is intended to provide OPI with information on which pages need to be reviewed.

The following screen shots and notes will help guide E-Grants users (both the OPI and LEA) in how to use the GMS Page Locking functionality and related pages.

Guide for LEA E-Grants Users

The **Page_Lock Control** tab navigates the E-Grants user to the **Page Review Status** Web page that provides a view of ALL data pages at the highest section of the E-Grants application. This is the LEA view of the E-Grants Page Review Status page for the ESEA / NCLB Consolidated application Web pages. The default page view will have no pages expanded as shown below.

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The "**Expand All**" field has not selected on this example and only the Title I-A Basic Program Specific section has been expanded by clicking on the Title I A – Basic (blue text).

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Detailed LEA Page Lock view of expanded application sections below:

OPI E-Grants System

OPI Home

Applicant Name: Helena H S   Legal Entity: 0488   Application Sections
Application: 2007-2008 Original Application   ESEA / NCLB Consolidated

Printer-Friendly
Click to Return to Application Select
Click to Return to Menu List / Sign Out

Overview | Contact Information | Funding | NCLB_Required_Plans and Needs Assessment | Private/Nonpublic School Consultation | Grant Summary | Assurances, Common and Program | Submit | Application History | Page_Lock Control

The application has been locked. No more updates will be saved for the application.

Page Review Status   Instructions

☑ Expand All

ESEA Consolidated	Page Status	Open Page for editing
ESEA / NCLB Consolidated	Unlock Section	☐
Contact Information	OPEN	☐
Funding	Unlock Section	☐
Allocations	OPEN	☐
Goal Funding	OPEN	☐
Private/Nonpublic School Consultation	Unlock Section	☐
Schools_1-20 Plus program details	OPEN	☐
Schools 21-40	OPEN	☐
Schools 41-60	OPEN	☐
Schools 61-80	OPEN	☐
Schools 81-100	OPEN	☐
Schools 101-120	OPEN	☐
Schools 121-140	OPEN	☐
Schools 141-160	OPEN	☐
Schools 161-180	OPEN	☐
Assurances, Common and Program	Unlock Section	☐
Common Assurances	OPEN	☐
Title_IA	OPEN	☐
Title_IIA	OPEN	☐
Title_IID	OPEN	☐
Title_III	OPEN	☐
Title_IVA	OPEN	☐
Title_VA	OPEN	☐
Title_VI	OPEN	☐
Assurances	OPEN	☐
AssurancesText	OPEN	☐
Title I A - Basic	Unlock Section	☐
Program Specific	Unlock Section	☐
Section_1116 School Improvement	Unlock Section	☐
School Choice Plan	OPEN	☐
Supplemental Educational Services	OPEN	☐
Section_1118 Parental Involvement	OPEN	☐
Neglected or Delinquent	OPEN	☐
Full-Time Equivalents	OPEN	☐
Targeting Step 1	OPEN	☐
Targeting Step 2	OPEN	☐
Targeting Step 3	OPEN	☐
Targeting Step 4	OPEN	☐
Budget Detail	OPEN	☐
Title II A - Improving Teacher Quality	Unlock	☐
Budget Detail	OPEN	☐
Budget Summary	OPEN	☐
Title II D - Enhancing Educ. through Technology		☐
Program Specific		☐
Goals and Objectives	OPEN	☐
Strategies for Objectives	OPEN	☐
Budget Detail	OPEN	☐
Title III - English Language Acquisition	Unlock Section	☐
Program Specific	OPEN	☐
Budget Detail	OPEN	☐
Title IV A - SDFSC	Unlock Section	☐
Program Specific	Unlock Section	☐
Program Activity	OPEN	☐
Performance Indicators	OPEN	☐
Budget Detail	OPEN	☐
Title V A - Innovative Programs	Unlock Section	☐
Program Specific	Unlock Section	☐
Private/Nonpublic Equitable Share	OPEN	☐
Local Use of Funds	Unlock Section	☐
Choice 1	OPEN	☐

LEA staff will need to 1) make desired selection(s) in the "**Open Page for editing**" column check box fields and then 2) press the SAVE button at the bottom of the page to make the changes effective. Web pages that are marked as FINAL or LOCKED will NOT be able to be edited so make sure the "**Page Status**" for the desired page is OPEN if changes are needed. Once the page status is OPEN, LEA users can navigate to the page and edit as required.

- The "**Open Page for editing**" check box fields provide LEA staff with ability to Open a page that was LOCKED by an OPI Grant Reviewer (GR) if the LEA needs to make additional changes to the page.
- Any page that is OPEN can be edited by the LEA. In most cases, the pages that are marked as OPEN by the OPI GR are the reason the application was returned for changes and to allow the LEA to make changes to the OPEN pages.
- If an OPI GR has marked a page as FINAL, the LEA will NOT be able to open the page for further changes without first calling the OPI GR to request the change.
- To OPEN an entire Section, select the "Unlock Section" checkbox field corresponding to the section. Press the Save button. This option will allow the LEA to edit all the pages in the section. **BE CAREFUL when using this control.**

LEA Page Locking View – Title I A - Basic Budget Detail Page Example

See below for screen shot of LOCKED Title I A - Basic Budget Detail page.

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Example of LOCKED Title I A - Basic Budget Detail page.

Until the LEA staff selects the "**Open Page for editing**" checkbox on the Page Review Status page (see prior screen shot), the Title I A - Basic Budget Detail page will display this message (RED text) and there will be no SAVE buttons on the page.

This screen shot shows the result <u>after</u> the LEA staff has selected the checkbox next to the Title I A - Basic Budget Detail page item for "Open Page for editing" and SAVED the Page Review Status page.

Page Status for the Title I A - Basic Budget Detail page is now "OPEN" so the page can be edited as shown in the screen shot below

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Example of OPEN Title I A - Basic Detail Budget page.

Screenshot of OPI E-Grants System Title I A - Basic Detail Budget page showing:

- Applicant Name: Helena H S
- Legal Entity: 0488
- Application: 2007-2008 Amendment 1
- Application Sections: Title I A - Basic
- Printer-Friendly
- Click to Return to Application Select
- Click to Return to Menu List / Sign Out

Navigation tabs: Overview | Program Detail | Budget Pages | Page_Lock Control

Sub-tabs: Full-Time Equivalents | Budget Detail | Budget Summary

Budget Detail BUDGET BREAKDOWN (Use whole dollars only. Omit Decimal Places, e.g., 2536)   Instructions

Itemize and explain each expenditure amount that appears on the Budget Summary. Click on the "Create Additional Entries" button to enter additional information.

Topic 1: Improving Academic Achievement

Callout: The "This page has been locked.." message is now <u>gone</u>.
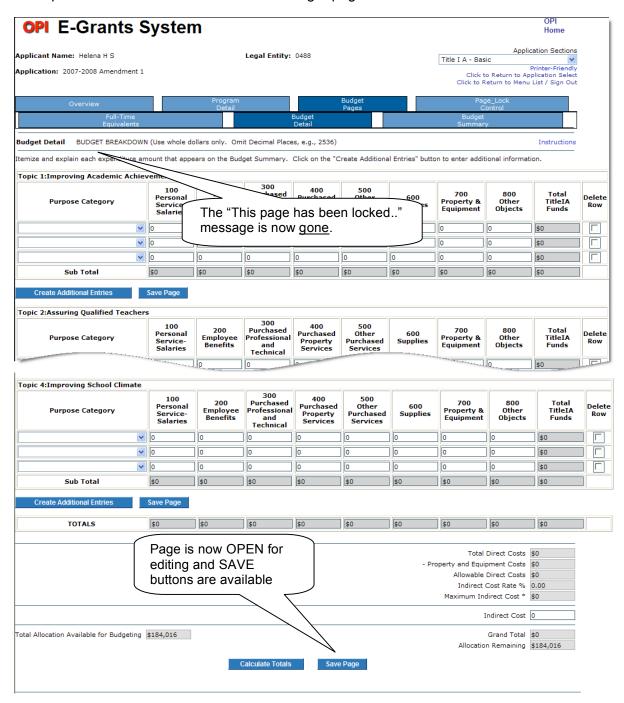
Purpose Category	100 Personal Service-Salaries	200 Employee Benefits	300 Purchased Professional and Technical	400 Purchased Property Services	500 Other Purchased Services	600 Supplies	700 Property & Equipment	800 Other Objects	Total TitleIA Funds	Delete Row
	0						0	0	$0	☐
	0						0	0	$0	☐
	0	0	0	0	0		0	0	$0	☐
Sub Total	$0	$0	$0	$0	$0	$0	$0	$0	$0	

Create Additional Entries   Save Page

Topic 2: Assuring Qualified Teachers

Purpose Category	100 Personal Service-Salaries	200 Employee Benefits	300 Purchased Professional and Technical	400 Purchased Property Services	500 Other Purchased Services	600 Supplies	700 Property & Equipment	800 Other Objects	Total TitleIA Funds	Delete Row
	0	0						0	$0	☐

Topic 4: Improving School Climate

Purpose Category	100 Personal Service-Salaries	200 Employee Benefits	300 Purchased Professional and Technical	400 Purchased Property Services	500 Other Purchased Services	600 Supplies	700 Property & Equipment	800 Other Objects	Total TitleIA Funds	Delete Row
	0	0	0	0	0	0	0	0	$0	☐
	0	0	0	0	0	0	0	0	$0	☐
	0	0	0	0	0	0	0	0	$0	☐
Sub Total	$0	$0	$0	$0	$0	$0	$0	$0	$0	

Create Additional Entries   Save Page

| TOTALS | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | $0 | |

Callout: Page is now OPEN for editing and SAVE buttons are available

Total Direct Costs	$0
- Property and Equipment Costs	$0
Allowable Direct Costs	$0
Indirect Cost Rate %	0.00
Maximum Indirect Cost *	$0
Indirect Cost	0

Total Allocation Available for Budgeting $184,016

Grand Total	$0
Allocation Remaining	$184,016

Calculate Totals   Save Page

OPI

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